openGear

DashBoard Control and Monitoring System

User Manual

ROSS

Video Production Technology

DashBoard User Manual

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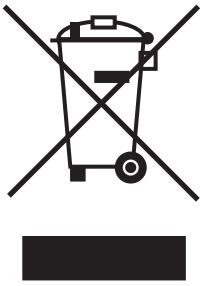
The crossed out wheelie bin symbol invites you to use these systems.



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You can also contact Ross Video for more information on the environmental performance of our products.

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Contents

Introduction 1

Overview 1-2
Features 1-2
Documentation Terms and Conventions 1-4

Installing DashBoard 2

Before You Begin 2-2
System Requirements 2-2
Installing the DashBoard Control System Client 2-3
Creating a Backup of the Settings and Licensed Features 2-3
Installing on a Computer Running Microsoft® Windows® 2-3
Installing on a Computer Running Apple® Mac® OS® X 2-4
Installing on a Computer Running Linux® Fedora® 2-4
Removing DashBoard 2-4
Installing DashBoard Add-on Programs 2-5
Getting Started 2-6
Viewing Installation Details 2-7
DashBoard Installation Details Overview 2-7
Viewing Installation Details 2-7
Viewing Error Logs 2-8

Managing openGear Frames in DashBoard 3

Managing openGear Frames in DashBoard 3-2
Adding openGear Frames to DashBoard 3-2
Re-naming an openGear Frame in the Tree View 3-3
Removing openGear Frames from a Tree View 3-3

Using the DashBoard Interface 4

DashBoard Interface Overview 4-2
Status Indicators 4-3
DashBoard Basic Tree View 4-5
Overview 4-5
Using the Basic Tree View 4-6
Using the Advanced Tree View 4-8
Overview 4-8
Using the Advanced Tree View 4-10
The Device Editor Area 4-12
Overview 4-12
Using the Device Editor Feature 4-13
Using Layouts 4-15
Overview 4-15
Managing Your Layouts 4-16
Keyboard Shortcuts 4-17
Overview 4-17

Managing the Keyboard Shortcuts 4-18
Resolving Conflicts 4-19
Importing and Exporting Libraries 4-20
Resetting to Default Values 4-20
Using DashBoard Help 4-21
Configuring the DashBoard Help Display Options 4-21
Importing openGear Help 4-22
Preferences 4-24
Secure Storage 4-24
Web Browser 4-24

DataSafe™ 5

DataSafe Overview 5-2
DataSafe Basics 5-4
Saving a DataSafe File 5-4
Restoring Configurations to Devices 5-4
Notes on Saving and Restoring Parameters 5-6
Forcing DataSafe Updates 5-7

Configuring Devices 6

Configuring Online Devices in DashBoard 6-2
Configuring Devices in DashBoard 6-2
Re-naming an openGear Slot in the Tree View 6-2
Automatic Discovery 6-3
Troubleshooting 6-4
Removing Devices from the Tree View 6-4
Using the File Navigator 6-5
Upgrading Device Software 6-7
Upgrading Device Software 6-7
Troubleshooting the Software Upload Process 6-8

Introduction

In This Chapter

This chapter contains the following sections:

- A Word of Thanks
- Overview
- Documentation Terms and Conventions

A Word of Thanks

Congratulations on choosing the DashBoard Control System™. DashBoard is part of a full line of Digital Products within the openGear Terminal Equipment family of products, backed by Ross Video's experience in engineering and design expertise since 1974.

You will be pleased at how DashBoard fits into your overall working environment. Equally pleasing is the product quality, reliability and functionality. Thank you for joining the group of worldwide satisfied Ross Video customers!

Should you have a question pertaining to the installation or operation of DashBoard, please contact us at the numbers listed on the back cover of this manual. Our technical support staff is always available for consultation, training, or service.

Overview

This manual provides an overview of installing, setting up, and using the DashBoard client. For information on using the DashBoard Server and User Rights Management features, refer to the ***DashBoard Server and User Rights Management User's Guide***.

The DashBoard Control System is built on Ethernet and TCP/IP technology, which allows remote access across LAN architectures. DashBoard offers the ability to view multiple frames with full control and alarming of all populated slots inside an openGear frame. This simplifies the setup of numerous devices in a large installation and offers the ability to centralize monitoring. The devices define their controllable parameters and layout to DashBoard, so the control interface is always up-to-date.

Alarms raised by devices in the frame are reported at the upper most level, making it quick and easy to identify potential failures or problems.

Monitoring

A network of openGear Connect compatible devices can be monitored, allowing users to quickly isolate and correct potential problems from a central monitoring station.

Control

DashBoard offers real-time control of openGear Connect compatible devices. Parameter items and menus vary depending on device functionality.

DataSafe™

DataSafe enables you to backup and restore device parameters to and from a single file, copy parameters from one device to a another device or even a group of devices via DashBoard. This feature allows you to hot-swap devices while retaining configurations, and DashBoard is not required to have the parameters on the new device updated. You can update a subset of devices instead of the entire connected view or to replace a device and have the previous device settings automatically loaded onto the new device. When using openGear cards, this feature is available for frames using the MFC-8310-N and MFC-8320-N Network Controller Cards series only.

Software Upgrades

You can upgrade the software and firmware on devices, such as openGear cards, in the field using DashBoard. The upgrade utility verifies firmware and software upgrades against device hardware and prevents accidental loading of incorrect files to the wrong hardware. DashBoard is designed to allow for future feature plug-ins and upgrades to allow users the ability to customize control and monitoring needs.

Features

The following features make DashBoard a unique system for your openGear requirements:

- DashBoard software and manual are available for download from the Ross Video website
- Store and upload configurations to multiple devices (using DataSafe)
- Ability to perform batch software upgrades to allow multiple cards, of the same model, to be upgraded at one time from any DashBoard terminal on the network
- Customize views with the Advanced Tree View feature
- Java™ based for installation in Microsoft® Windows®, Mac® OS, and Linux® Fedora®
- Access multiple openGear frames on a single control network

- Access multiple DashBoard applications on a single control network
- Ability to have multiple control windows active and available on one screen
- Automatic discovery of openGear Connect devices
- Software and firmware upgrades via ethernet
- Extensible plug-in architecture

Documentation Terms and Conventions

The following terms are used:

- All references to the **DFR-8300 series frame** also includes all version of the 10-slot and 20-slot frames and any available options.
- "**Card**" refers to openGear terminal devices within openGear frames, including all components and switches.
- "**DashBoard window**" refers to the main DashBoard client interface.
- "**Device**" refers to an openGear Connect compatible product listed in DashBoard, such as an openGear frame or card.
- "**Frame**" refers to any openGear frame within your video system.
- "**Network Controller Card**" refers to the MFC-8310-N series and MFC-8320-N series cards unless otherwise noted.
- "**System**" refers to the mix of interconnected production and terminal equipment in your environment.
- "**Tree View**" refers to the Basic Tree View and Advanced Tree View unless otherwise noted.
- "**User**" refers to the person who uses the DashBoard client.

The following conventions are used:

- Navigation procedures assume that you are running Microsoft® Windows®. If you are running Mac® OS or Linux® Fedora®, the menus names and options may differ.
- Some navigation procedures state the menu items located on the main DashBoard toolbar that you are to select followed by the ">" symbol. For example, **File** > **New** > **Other**.
- Some navigation procedures state the button on your keyboard to press, followed by the "+" symbol, followed by another button to press. For example, **Shift** + **F4**.
- "**Operating Tip**" and "**Note**" boxes provide additional information.

Installing DashBoard

In This Chapter

This chapter provides instructions for installing the DashBoard Control System client software. For information on installing the DashBoard URM and Server, refer to the ***DashBoard Server and User Rights Management User Manual***.

The following topics are discussed:

- Before You Begin
- Installing the DashBoard Control System Client
- Getting Started
- Viewing Installation Details

Before You Begin

Before installing any software for your DashBoard Control System client, ensure that you exit all other programs currently running.

Note — *Contact your I.T. Department if you experience communication issues with DashBoard and are running anti-virus software. You may need to verify that there is an exception in your firewall to allow DashBoard to receive TCP data via Port 5353.*

System Requirements

Refer to the following sections for information on the system requirements for DashBoard.

Microsoft® Windows® XP/XP64/Vista/Vista64/7 Systems

The following are the minimum requirements when installing DashBoard on a Microsoft® Windows® system:

- Intel® Pentium 4, 1.6GHz (Intel® Core™ 2 Duo recommended)
- 1GB or more of RAM (2GB is recommended)
- 200MB available in HD space
- Microsoft® Internet Explorer® version 5 (minimum)

Apple Mac® OS X 10.5 (Leopard®) / 10.6 (Snow Leopard™) / 10.7 (Lion™) Systems

The following are the minimum requirements when installing DashBoard on a Mac® OS system:

- Intel® Core Duo processor
- 1GB or more of RAM (2GB is recommended)
- 200MB available HD space
- Java® 6 installed
- Mac® Safari®

Linux® Fedora® 9/10/11 Systems

The following are the minimum requirements when installing DashBoard on a Linux® system:

- Intel® Pentium 4, 1.6GHz (Intel® Core™ 2 Duo recommended)
- 1GB or more of RAM (2GB is recommended)
- 200MB available in HD space
- Version 2.2.1 GTK+ widget toolkit and associated libraries (GLib, Pango) are required
- Mozilla® 1.4GTK2 or higher

Installing the DashBoard Control System Client

This section includes instructions on installing the DashBoard client to your computer. The DashBoard software and user manual are available from the Ross Video website.

Creating a Backup of the Settings and Licensed Features

Regular backups of your DashBoard settings is recommended, or if you want to create a backup of your DashBoard settings and license files, before installing a new version of DashBoard.

- **Microsoft® Windows®** — DashBoard automatically uninstalls a previously installed version, but not your settings.
  - › To create a back up your settings Microsoft® XP® and earlier, navigate to the metadata folder. Depending on your operating system version, this folder may be located at **c:\Program Files\DashBoard\ workspace**. Copy the workspace folder contents to a new location.
  - › If you are running Microsoft® Vista® or higher, the metadata folder is at: **c:\DashBoard\workspace**. Copy the folder to a new location.
- **Apple® Mac® OS®** — DashBoard saves application information to the following location on your computer: **/Library/Application Support/openGear/DashBoard**. To create a backup of your settings, copy the **workspace** folder to a different location on your system.
- **Linux® Fedora®** — DashBoard creates a **workspace** directory inside of the current DashBoard directory when the application is launched. To create a backup copy of your settings, copy the workspace directory to a different location on your system.

Installing on a Computer Running Microsoft® Windows®

Note that if you are running Microsoft® Vista® or higher, the DashBoard main folder is at: **c:\DashBoard** while previous Microsoft® operating systems will install DashBoard to **c:\Program Files\DashBoard**.

Use the following procedure to install DashBoard on a computer running Microsoft® Windows®:

Note — *If you are upgrading your DashBoard Control System to software version 2.0, or higher, the Install Wizard automatically uninstalls any previous software versions before proceeding.*

1. Access the DashBoard software using one of the following methods:
   - Navigate to the Ross Video website and download the current software file.
   - Load the DashBoard software CD into the DVD/CD ROM tray of your computer.
2. If you are accessing the software from a CD, the **Installation Wizard** automatically runs. If the Wizard does not automatically run, you can also install the DashBoard software, navigate to your DVD/CD ROM drive in the **Navigation Pane**, so that the CD contents are displayed in the **Main Window** of Windows Explorer.
3. Launch **DBx.x.x-Win-setup.exe** to begin installing the DashBoard program onto your computer.
4. Follow the prompts to complete the installation of DashBoard onto your computer.

Installing on a Computer Running Apple® Mac® OS® X

Use the following procedure to install DashBoard on a computer running Apple® Mac® OS® X:

1. If you have a previous version of DashBoard installed, it is recommended that you remove the DashBoard directory from the **Applications** folder before proceeding.
2. Access the DashBoard software using one of the following methods:
   - Navigate to the Ross Video website and click the link to the DashBoard installation program for Apple OS X.
   - Load the DashBoard software CD into the DVD/CD ROM tray of your computer and navigate to the DashBoard *.pkg file for Apple OS X.
3. Navigate to the *.pkg file you downloaded in step 2.
4. Double-click the *.pkg file to begin installing the DashBoard program onto your computer.
5. Follow the prompts to complete the installation of DashBoard onto your computer.

Installing on a Computer Running Linux® Fedora®

Use the following procedure to install DashBoard on a computer running Linux® Fedora®:

1. If you have a previous version of DashBoard installed and want to keep your settings, remove all folders, except the workspace directory, from the DashBoard directory. Note that the uninstall function of DashBoard may delete the directory that also contains your user data.
2. Access the DashBoard software using one of the following methods:
   - Navigate to the Ross Video website and click the link to the **DashBoard.tar.gz file** for Linux.
   - Load the DashBoard software CD into the DVD/CD ROM tray of your computer.
3. Extract the new **DashBoard.tar.gz file** to your system. Note that this file contains a top-level directory called DashBoard.
4. To run DashBoard, click the **DashBoard** icon in the top level of the DashBoard program folder. Note that if you run DashBoard from the command line, ensure that you switch to the main DashBoard directory before launching DashBoard.

Note — *DashBoard creates a workspace directory where the application is launched. This directory includes saved settings and licenses for optional features. To provide consistent retrieval of saved settings and program features, Ross Video recommends that you always launch Dashboard from within the same directory.*

Removing DashBoard

Ensure to create a backup for your settings and licensed features as outlined the section "**Creating a Backup of the Settings and Licensed Features**" on page 2-3 if you wish to retain your user data before removing DashBoard from your computer.

To remove DashBoard from a computer running Microsoft® Windows®:

- If you are using a computer running Microsoft® Windows®, use the **Add/Remove Software** program located in the Windows® Control Panel.
- Do not delete the DashBoard directory, instead run the **Add/Remove Software** program. Deleting the directory without running the **Add/Remove Software** program results in a

number of dead registry and start menu items on your system. You can delete the directory to remove your user data after you run the **Add/Remove Software** program.

To remove DashBoard from a computer running Apple® OS X®:

- Remove your user data from the application support library directory.
- Delete the Dashboard folder from your computer.

To remove DashBoard from a computer running Linux® Fedora®:

- Ensure to create a backup for your settings and licensed features if you wish to retain your user data.
- Delete the Dashboard folder from your computer.

Installing DashBoard Add-on Programs

This section briefly outlines how to install Add-on programs for DashBoard such as:

- **openGear Extra Feature Pack** — If you have an executable openGear Extra Feature pack, and are running Microsoft® Windows®, use the following procedure to install your feature pack. If you are not running Microsoft® Windows®, refer to the feature pack documentation for installation details.
- **Unicode Font Support Pack** — This program installs an international character set for DashBoard and provides access to fonts capable of displaying all Unicode characters. This program is not available for systems running Apple Mac® OS®. This option may be required if you are using an openGear device designed with fonts not supported by the base Java font system. Consult your device documentation for requirements and details.

Use the following procedure to install a DashBoard Add-on program:

1. Navigate to the openGear website (www.opengear.tv) and download the required add-on program for your system.
2. If you are running Microsoft® Windows®:
   - Launch the **Setup Wizard** for your Add-on program by selecting the corresponding ***.exe file**.
   - Follow the prompts to complete the installation of the Add-on program.
3. If you are running Linux® Fedora®:
   - Ensure you are in the main **DashBoard** directory before extracting the Add-on program.
   - Copy the required ***.zip** to the main **DashBoard** directory.
   - Extract the ***.zip** file.

Getting Started

This section provides a brief introduction to launching the DashBoard client, and accessing some of its features.

To launch DashBoard

1. Ensure that you have installed the DashBoard software as outlined in the section "**Installing the DashBoard Control System Client**" on page 2-3.
2. Launch the DashBoard client by double-clicking its icon on your desktop.
3. If you are using DashBoard Server and URM, you will be prompted for a user name and password.

Using the Full-screen mode

You can set the DashBoard interface to full-screen by performing one of the following:

- Press **Shift** + **F11**.
- Select **Window** > **Full Screen** from the main DashBoard toolbar.

To exit out of full-screen mode by performing one of the following:

- Press **Shift** + **F11**.
- Right-click the DashBoard icon in the system tray and unselect **Full Screen**.

Displaying multiple DashBoard windows

When operating in a multi-screen environment, you can open multiple DashBoard windows as follows:

- Select **Window** > **New Window** from the main DashBoard menu bar.

Locking the DashBoard window

You can lock the DashBoard window, preventing users from accessing the DashBoard client running on your computer by performing one of the following:

- Press **Shift** + **F4**.
- Select **Window** > **Lock Screen**.

To unlock the interface:

- Use the provided **Unlock** wheel.

Viewing Installation Details

You can view your installation history, activities in DashBoard, and error logs using the **DashBoard Installation Details** dialog box available from the **About DashBoard** dialog box.

DashBoard Installation Details Overview

This section briefly explains the components of the **DashBoard Installation Details** dialog box should you need to view it for troubleshooting purposes or as directed by Ross Video Technical Support.

The **DashBoard Installation Details** dialog box includes the following tabs:

- **Installed Software** tab — This tab displays the currently installed DashBoard features, plug-ins, and application details. Details such as software version and ID are also provided.
- **Installation History** tab — This tab displays information on the current and any previous configurations of DashBoard installed on your computer. Details such as the date of installation and applications installed are also provided. From this dialog, you can also Revert to any previously installed software using the Revert button.
- **Plug-ins** tab — This tab displays the ID, name, provider, and version of the currently installed plug-ins, or add-on programs, for DashBoard.
- **Configuration** tab — This tab displays information such as platform details, system properties, and user preferences that can be used for troubleshooting.

Viewing Installation Details

Use the following procedure to view the installation details for your DashBoard client:

1. Launch DashBoard by double-clicking its icon on your desktop.
2. From the main DashBoard toolbar, select **Help** > **About DashBoard** > **Installation Details**. The **DashBoard Installation Details** dialog box opens.
3. To view details on the currently installed software features and options for your DashBoard application:
   - Select the **Installed Software** tab.
   - From the provided list, select the required software feature.
   - Click **Properties**.
4. To view details on your DashBoard installation history:
   - Select the **Installation History** tab.
   - Select the required configuration from the **Previous configurations:** list.
   - The **Configuration contents** pane updates to include a list of the features and options.
5. To view details on the installed plug-ins for your DashBoard application:
   - Select the **Plug-ins** tab.
   - Select the required plug-in from the provided list.
   - Click **Legal Info** to display the plug-in licensing agreement.

- Click **Show Signing Info** to display a new pane that includes the signing date and the signing certificate for the selected plug-in. Click **Hide Signing Info** to close the pane.
- Click **Columns** to configure how information is displayed in the **Plug-ins** tab.

Viewing Error Logs

If you are troubleshooting problems in DashBoard, Ross Technical Support may request that you view the error logs for your local DashBoard application.

To view the error log for your DashBoard application

1. From the main DashBoard toolbar, select **Help** > **About DashBoard** > **Installation Details**. The **DashBoard Installation Details** dialog box opens.
2. Select the **Configuration** tab.
3. Click **View Error Log** to display the error log in the selected application.

Managing openGear Frames in DashBoard

In This Chapter

The DFR-8300 series frames offers remote control and monitoring with the combination of the openGear Network Interface card and the DashBoard Control System™. This allows users to remotely monitor and control parameters on openGear Connect compatible devices, such as openGear frames and cards. DashBoard connects to an openGear frame using a TCP/IP LAN connection.

This chapter provides instructions for managing openGear frames in the DashBoard Control System.

Note — *For details on configuring your openGear frame and Network Controller Card, refer to the **DFR-8300 Series User Manual** and the **MFC-8300 Series User Manual**.*

The following topic is discussed:

- Managing openGear Frames in DashBoard

Managing openGear Frames in DashBoard

When DashBoard is launched, openGear frames are automatically discovered and are available in the Tree View where they can be custom identified, collapsed to view just the frame or opened to view available devices in the frame.

This section includes information for enabling DashBoard to auto-connect to openGear frames, manually adding and re-naming frames to the Tree View, and removing frames from the Tree View.

Refer to the section "**DashBoard Basic Tree View**" on page 4-5 for information on using the Basic Tree View. For information on using the Advanced Tree View, refer to the section "**Using the Advanced Tree View**" on page 4-8. It is assumed that if you have the DashBoard Server and URM feature installed, that your user account is configured for write access to the frames communicating with your DashBoard client.

Note — *DashBoard uses the open SLP protocol to locate openGear frames on the network. In larger installations, it is recommended to use an SLP Directory Agent (DA). Contact your IT Department for more information on whether your facility uses an SLP DA.*

Adding openGear Frames to DashBoard

Each openGear frame lists all devices within the frame, and provides status information in the Tree View. You can also remove and disconnect an openGear frame from DashBoard. There are two methods for adding an openGear frame to the tree view: using the auto-connect feature or manually adding a frame by specifying the IP address of the frame. Both methods are described in this section.

Using the Automatic Detection Feature

By default, the DashBoard Control System auto-detects any openGear frame on the same IP subnet. How often DashBoard queries the network for new frames (the default is every 10 seconds) depends on how the **Automatic Detection** feature is configured in the **Preferences** menu. Refer to the section "**Automatic Discovery**" on page 6-3 for setup details. Refer to the section "**DashBoard Basic Tree View**" on page 4-5 for information on the toggling the **Auto-Connect Devices** button.

Manually adding openGear Frames to DashBoard

You will need to manually add openGear frames to the Tree View when the frame is on a different subnet from your computer running the DashBoard client.

Use the following procedure to manually add an openGear frame to a DashBoard Tree View:

1. Click ✚ on the **Tree View** toolbar to open the **Select Equipment or Service Type to Add** dialog box.
2. Expand the openGear node.
3. Select **TCP/IP openGear Frame**.

Operating Tip — *You can also select **File** > **New** > **TCP/IP openGear Frame** from the main DashBoard toolbar.*

4. Click **Next >** to open the **New TCP openGear Frame Connection** dialog box. The **Invalid host name or IP address** message remains until you enter text in the **IP Address** field.

5. In the text fields provided, enter the IP Address, display name for the frame, and port of the openGear frame you wish to add.

Operating Tip — *You can also click **Detect Frame Information** to enable DashBoard to detect the port, name, unique identifier and other connection information from the specified IP Address. Once DashBoard detects the information, the **Automatically Track Updates to Frame Information** check box is selected so that any changes are automatically updated in DashBoard.*

6. Click **Finish** to display the openGear frame in the **Tree View**. Frames added to the Tree View are also displayed in the Advanced Tree View.
7. Repeat the procedure for each openGear frame that you wish to add to the **Tree View**.

Re-naming an openGear Frame in the Tree View

There are two methods for re-naming an openGear Frame in DashBoard. The first method is for frames manually added to the Tree View as described in the section "**Adding openGear Frames to DashBoard**" on page 3-2. The second method describes how to re-name an auto-detected frame using the DashBoard menu options available on the MFC-8300 series cards. Both methods are described below.

To re-name a manually added openGear frame

1. Right-click the frame you wish to rename.
2. Select **Rename Frame**.
3. Enter the new name for the frame in the text field provided.

Note — *This option is not available if you enabled the **Automatically Track Updates to Frame Information** option. When this option is enabled, follow the steps outlined in the section "**To re-name an Auto-Detected openGear frame**".*

4. Click **OK**.

To re-name an Auto-Detected openGear frame

1. Right-click the frame you wish to rename.
2. Select **Open** to display a Device Editor tab. Note that the tab title displays the name of the frame, and information about the MFC-8300 series Network Controller Card currently installed in the frame.
3. Select the **Network** tab.
4. Enter a new name for the frame in the **Frame Name** field.
5. Press **Enter**.
6. Click **Apply**.

Removing openGear Frames from a Tree View

This section outlines how to remove an openGear frame from a Tree View in DashBoard. Once a frame is removed, DashBoard no longer reports the status in the Tree View and you are no longer able to monitor or control the affected devices. If communication with a frame is disconnected via the Disconnect option, the status indicator is light gray until the frame is re-connected. If the status indicator is dark gray, with the rest of the node displaying as normal, a connection cannot currently be established to the device.

To remove or disconnect an openGear frame from the Tree View

1. If the frame you are removing is in a Custom Folder, you must first delete the frame from the Custom Folder before it can be removed from the Tree View.
2. To remove a manually added openGear frame from the Tree View:
   - Right-click the openGear frame you wish to remove.
   - Select to remove the openGear frame from the Tree View.
3. To disconnect communications to an openGear frame from DashBoard:
   - Toggle to off.
   - Right-click the openGear frame you wish to disconnect.
   - Select .
   - The frame status indicator is grayed out in the Tree View.
4. To re-connect to an openGear frame:
   - Right-click the frame status indicator.
   - Select or toggle to on.

Auto-Discovery

Selecting for an auto-detected frame will temporarily remove the frame but the frame will re-appear in the Tree View again due to the auto-discovery feature of DashBoard. You must first disable the auto-discovery feature before you can remove a frame in this instance. Refer to the section "**Automatic Discovery**" on page 6-3 for details on configuring the auto-discovery feature.

However, you can still disconnect from an auto-discovered frame by toggling the **Automatic Discovery** option off.

Using the DashBoard Interface

In This Chapter

DashBoard allows for multiple Device Editor tabs to be active and available on one screen which is useful when a functional path involves more than a single device. These tabs can be saved and recalled as a layout, allowing for quick access to frequently used devices. Layouts can consist of a single device window, multiple device windows displayed full screen in tabs, or multiple devices on a shared screen.

This chapter introduces you to the DashBoard client interface, how to access menus and tabs, and how to manage your layouts.

Note — *Contact your I.T. Department if you experience communication issues with DashBoard and are running anti-virus software. You may need to verify that there is an exception in your firewall to allow DashBoard to receive TCP data via Port 5353.*

The following topics are discussed:

- DashBoard Interface Overview
- DashBoard Basic Tree View
- Using the Advanced Tree View
- The Device Editor Area
- Using Layouts
- Keyboard Shortcuts
- Using DashBoard Help
- Preferences

DashBoard Interface Overview

This section includes a brief summary of the DashBoard Control System client interface and its components. **Figure 4.1** displays a DashBoard window that includes the Custom Folders and Layouts View tabs. These tabs are not displayed by default when the DashBoard client is launched for the first time.

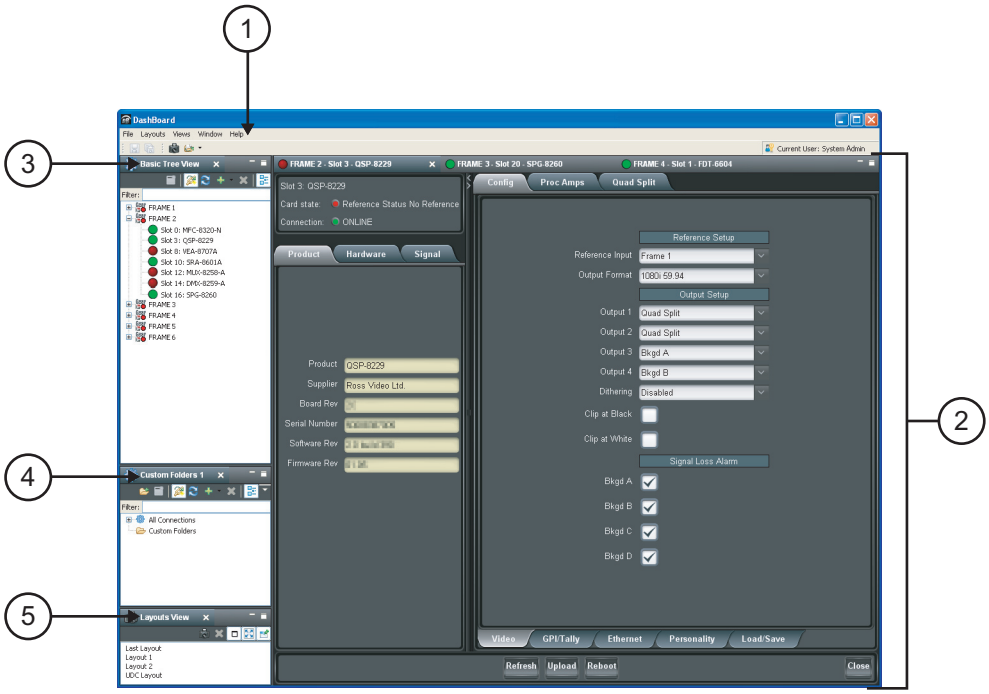


Figure 4.1 *DashBoard Interface Overview*

1. Main DashBoard Toolbar

The Main DashBoard toolbar provides access to menus that enable you to manually add devices, manage your layouts, and enable different tabs in the DashBoard window.

- **File** — From this menu you can manually add a device (New), save changes made to device configuration files on your computer (Save, Save As..., Save All), log-off from DashBoard when using DashBoard URM (Sign Out), or close the DashBoard client (Exit).
- **Layouts** — From this menu you can display a Layouts View tab in the DashBoard window (Show Layouts View), save your current arrangement of tabs in the DashBoard window (Save Layout), lock the DashBoard window to its current state (Maintain Window State/Size/Location), or select from a list of saved layouts to apply.
- **Views** — From this menu you specify which tabs to display in the current DashBoard window.
- **Window** — From this menu you can open multiple DashBoard windows on a single screen (New Window), restore the default DashBoard client layout of tabs (Refresh Perspectives), show or hide the main toolbar (Show Toolbar), set the window to the maximum screen size (Full-screen), lock the current DashBoard window (Lock Screen), and set preferences for Automatic discovery of devices on your subnet, automatic login, and software updates (Preferences).
- **Help** — From this menu you can access the DashBoard online help system (Help Contents), perform checks for DashBoard software updates (Check for Updates), and view details about your current DashBoard client software (About DashBoard).

2. **Device Editor**

   This area displays tabs for each device that you double-click from the Tree View. From this view you can verify the device and connection status, update device parameters, and view read-only device information.When shutting down and then re-starting the DashBoard client, the Device Editor tab state is also saved/restored. Refer to the section "**The Device Editor Area**" on page 4-12 and your device manual for more information.

3. **Basic Tree View Tab**

   This area lists the devices, such as openGear frames and the cards installed in each frame, that can communicate with DashBoard. From this tab you can open Device Editors, enable or disable auto connections to devices, re-query the network for new devices, manually add new connections, and delete devices from the Tree View. Refer to the section "**DashBoard Basic Tree View**" on page 4-5 for more information.

4. **Advanced Tree View Tabs**

   The Advanced Tree View feature enables you to create a customized hierarchy of folders and subfolders in a single tab, where each folder can be expanded to display a list of devices and/or subfolders. You can re-organize your devices in a Custom Folder tab to suit your workflow by dragging and dropping devices from the Basic Tree View to any open Custom Folder tab. Note that this tab is not displayed by default. For more information on using Custom Folders, refer to the section "**Using the Advanced Tree View**" on page 4-8.

5. **Layouts View Tab**

   This feature enables you to save and restore a series of Device Editor tabs and the DashBoard window size and position as a layout. Layouts can be recalled using the options in the Main DashBoard toolbar or from a Layouts View tab. Note that saving/restoring a layout restores the current Device Editor tab selection, the divider position and scroll position in opened Device Editor tabs. Note that this tab is not displayed by default. For more information on layouts, refer to the section "**Using Layouts**" on page 4-15.

Status Indicators

Some device include a status indicator beside its node in the Tree Views, custom folders and subfolders. These indicators may change color to indicate the status of devices as follows:

- **Green** — This color indicates that the device is running correctly and communicating with the frame.
- **Orange** — This color indicates that the MFC-8300 Network Controller Card for that frame can only support a limited number of connections and that maximum has been reached. You can select the **Force Connect** option, after right-clicking on the frame status indicator, to establish a connection between the frame and your DashBoard workstation. However, doing so will disconnect another connection to the same MFC-8300 Network Controller card.
- **Yellow** — This color indicates a minor problem with the device.
- **Red** — This color indicates that the device has a significant error condition. For example, there is no input or reference signal from the card.
- **Gray** — This color indicates the device is currently offline and cannot communicate with DashBoard. The offline status is also reflected in its **Device Editor** tab.
- icon — If the status indicator is replaced by this symbol, the user does not have permission to view/modify the device. In the case of an openGear frame, this icon means the frame parameters are locked and the Master Password is required to use it. Refer to

the ***DashBoard Server and URM User Manual*** and the ***MFC-8300 Series User Manual*** for details. When a device has this icon, there are no editable parameters underneath it.

Note — *The **Frame Status Indicator**, the Custom Folders, and the subfolders reflect the most severe status of any detected devices.*

DashBoard Basic Tree View

This section outlines the Basic Tree View of the DashBoard client. For details on using the Advanced Tree View feature, refer to the section "**Using the Advanced Tree View**" on page 4-8.

Overview

The Basic Tree View displays devices, such as openGear frames and cards, in a tree structure. When you launch DashBoard, all devices within the same subnet are auto-detected unless this feature is disabled in the tab toolbar. Refer to the section "**Managing openGear Frames in DashBoard**" on page 3-2 for information on adding openGear frames to the Basic Tree View. For information on connecting your openGear frame using a TCP/IP connection, refer to your frame user manual or your facility IT personnel.

The Basic Tree View also displays the devices and status information of each device, allowing you to monitor and control devices from a single computer. The Basic Tree View includes a Filter feature that enables you to search this hierarchy by entering text into the field. **Figure 4.2** provides an example of a Basic Tree View.

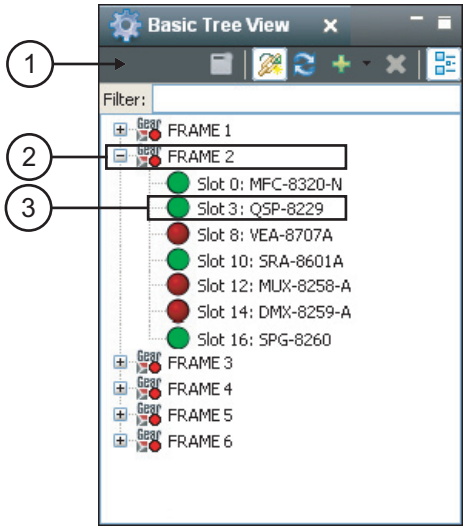


***Figure 4.2** Example of a Basic Tree View*

1. Basic Tree View Toolbar

This area provides access to the following basic tasks:

- **Device Editor Button** — Selecting this button enables you to view a Device Editor tab of a selected device. To view a Device Editor tab, click the device you wish to edit from the tree view, and select this button. You can also double-click the device from the Basic Tree View list. You can also open additional copies of a Device Editor tab by right-clicking the node and select Open; the active tab is the one displayed in the foreground.
- **Auto-Connect Devices Button** — Toggling this button enables DashBoard to automatically connect to devices and display information in the Basic Tree View. The default setting is enabled (auto-connect).
- **Re-query the Network Button** — Selecting this button enables DashBoard to query the network and automatically add any new devices to the Basic Tree View. Note that DashBoard automatically queries the network approximately every 10 seconds. If Automatic Discovery is disabled, you can force a network query by selecting this button.

- **Add New Connection Button** — Selecting this button opens the **New** dialog box and enables you to manually add a device, such as an openGear frame, to the Basic Tree View. Use this button to add a device that cannot auto-connect but can be found via the network.
- **Delete Button** — Selecting this button enables you to delete a selected offline or manually added device from the Basic Tree View.
- **Group Similar Devices Button** — This button determines how devices are displayed in the Tree View. When toggled on, devices are grouped by class. When toggled off, the Tree View is sorted alphabetically.

2. **Filter Search Field**

   Each Custom Folder includes a Filter feature that enables you to search the Tree View by entering text into the field. DashBoard automatically displays the search results in the selected tab under the All Connections node. For example, to search for a UDC-8225, enter 8225 in the **Filter** field and the tab only lists the frames that have a UDC-8225 installed. Expand the frame nodes inside the All Connections node to display the specific slots with UDC-8225 cards. To clear the **Filter** field, delete the text.

3. **openGear Frame Status Indicator**

   A status indicator is displayed for each openGear frame detected by DashBoard and is located to the left of the frame name. This status indicator summarizes the current status of the detected devices in that specific openGear frame. For example, FRAME 2 in **Figure 4.2** indicates a red status because at least one card is reporting a red status (in this case there are three). A , or an arrowhead, next to a status indicator signifies that the list can be expanded to display a list of devices installed in that frame.

4. **Device Status Indicator**

   A status indicator is listed for each openGear Connect compatible device. This icon includes the card status, the slot in which it is installed in that frame, and the device product name. This information is detected automatically. To view a device in the **Device Editor**, double-click its status indicator. Note that if the device is offline, you cannot open a tab for it in the Device Editor area.

Using the Basic Tree View

This section briefly summarizes how to use the Basic Tree View features.

To open or close the Basic Tree View tab

- To open a tab, select **Views** > **Basic Tree View**.
- To close a tab, right-click the **Basic Tree View** tab, then select **Close**.

To enable automatic discovery

Note that this method is applicable to all tree views.

1. Confirm the Automatic Discovery feature settings by selecting **Window** > **Preferences**. Note that by default, this feature is enabled and DashBoard polls for devices every 10 seconds.

2. Toggle on the **Basic Tree View** toolbar to enable DashBoard to automatically connect to the listed devices in the Basic Tree View.

To manually add a device to the Basic Tree View

1. Click on the **Basic Tree View** toolbar to display the **Select Equipment or Service Type to Add** dialog box.
2. Add a connection by following the on-screen instructions.

To display a Device Editor tab

Display a Device Editor tab using one of the following methods:

- From the **Basic Tree View**, double-click the device node.
- From the **Basic Tree View**, select the device to edit. Click on the **Basic Tree View** toolbar.

To remove a device from the Basic Tree View

1. Select the device to remove from the Basic Tree View.
2. Click on the **Basic Tree View** toolbar to display the **Confirm tree item removal** dialog box displays.
3. Click **OK**.

Using the Advanced Tree View

The Advanced Tree View feature enables you to display a tab that you can customize with a layout of folders. A folder can display any number of devices or subfolders of devices in a single tab. This feature allows you to drag and drop devices into subfolders, enabling you to quickly customize folders as required. For example, you may wish to create a folder that lists only the UDC-8625 cards installed in your facility.

All device information is automatically updated whenever parameters or status changes occur. You can have multiple custom folder tabs open or have multiple Advanced Tree View tabs open in a single DashBoard window.

Overview

This section summarizes the Advanced Tree View tabs, Custom Folders and subfolders, and the available menu options.

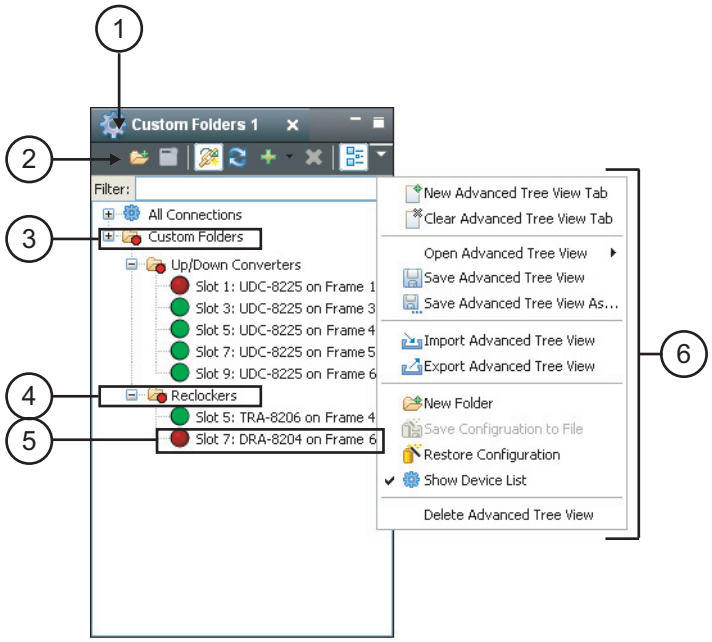


***Figure 4.3** Advanced Tree View*

1. Custom Folder Toolbar

Like the Basic Tree View, the Custom Folder toolbar includes the Device Editor, Delete and Add New Connection buttons, saving the current tree view, saving and restoring device configuration, and accessing the extra menu options of the Custom Folders tab. In addition, there is a button for creating new subfolders. You can save the current tree view using the button in the main DashBoard toolbar.

2. Filter Search Field

Each Custom Folder includes a Filter feature that enables you to search the Tree Views by entering text into the field. DashBoard automatically displays the search results in the selected tab under the All Connections node. For example, to search for a UDC-8625, enter 8625 in the **Filter** field and the tab only lists the frames that have a UDC-8625 installed. Expand the frame nodes inside the All Connections node to display the specific slots with UDC-8625 cards. To clear the **Filter** field, delete the text.

3. Custom Folders

Each Advanced Tree View tab includes a main Custom Folder. In this folder, you can create and re-name subfolders to organize devices for customized views. The status indicator represents the current status of the devices in the custom subfolder. If a device in the subfolder needs attention, the status indicator shows the most critical warning level. For example, the Custom Folders icon in **Figure 4.3** indicates a red status because the UDC-8225 in FRAME 1 and the DRA-8204 in FRAME 6 are reporting an error conditions.

Right-clicking a custom folder displays a dialog that includes options for creating a new subfolder, connecting or disconnecting devices, and re-naming the folder. To add devices to a Custom Folder, simply drag a device or frame from the All Connections directory to the desired Custom Folder.

4. Custom Subfolders

A Custom Subfolder displays the devices connected to DashBoard that you have specified. Creating Custom Subfolders allows you to group similar devices together that may be installed in different frames, such as the folders in **Figure 4.3**. If a device in the subfolder needs attention, the status indicator shows the most critical warning level. For example, the Reclockers subfolder in **Figure 4.3** indicates a red status because the DRA-8204 in FRAME 6 is reporting an error condition (a red status).

Right-clicking a subfolder displays a dialog that includes options for creating a new sub-subfolder, connecting or disconnecting devices, re-naming the folder, removing the selected subfolder, saving and recalling configuration folders.

5. Device Status Indicator

A status indicator is listed for each device in a subfolder. This icon includes the device status, the slot and frame in which it is installed (if it is an openGear card), and the device product name. This information is detected automatically, but you can also re-name an openGear frame or card as required. To view a Device Editor tab, double-click the device node. Right-clicking a device displays a menu that includes options for opening the device, restoring or saving the configuration, re-naming the device or removing the device.

6. Custom Folders Extra Options

You may need to select the ▽ button on the **Custom Folder** toolbar to display the available Extra Options.

- **New Advanced Tree View tab** — This option opens a new **Advanced Tree View** tab in DashBoard.
- **Clear This Advanced Tree View tab** — This option closes the current Advanced Tree View and opens a new Advanced Tree View in its place. If you have made any changes to the current Advanced Tree View, you will be prompted to save your work.
- **Open Advanced Tree View** — This option enables you to select a previously saved Advanced Tree View to open in the current session of DashBoard.
- **Save Advanced Tree View** — This option saves the selected Advanced Tree View. If you have re-named the main Custom Folder, the new name is now displayed. An asterisk displays next to the Custom Folder tab name when there are unsaved changes for that tab.
- **Save Advanced Tree View As…** — This option saves the selected Advanced Tree View under a new filename.
- **Import Advanced Tree View** — This option enables you to import an Advanced Tree View from another location or DashBoard computer.
- **Export Advanced Tree View** — This option enables you to export an Advanced Tree View to another location or DashBoard computer.

- **New Folder** — This option enables you to create a new subfolder in the Advanced Tree View.
- **Save Configuration to File** — This option is only available when using the MFC-8310-N and MFC-8320-N Network Controller Cards. For more information on this feature, refer to the section "**DataSafe Overview**" on page 5-2.
- **Restore Configuration** — This option is only available when using the MFC-8310-N and MFC-8320-N Network Controller Cards. For more information on this feature, refer to the section "**DataSafe Overview**" on page 5-2.
- **Show Device List** — Selecting this option displays or hides the list of connected frames and devices in the **Advanced Tree View** tab.
- **Delete Advanced Tree View** — This option deletes the current Custom Folder from DashBoard.

Using the Advanced Tree View

This section briefly summarizes how to use the Advanced Tree View features.

To open a new Advanced Tree View tab in DashBoard

1. From the DashBoard main toolbar, select **Views** > **Advanced Tree View** > **New Advanced Tree View Tab**.

To add a new subfolder to the Custom Folders

1. On the Custom Folders toolbar, select . If you do not see this button, click first to display a list of available functions.
2. You are prompted to enter a name for the new subfolder. An asterisk (*) displays at the top of the Custom Folders tab to remind you to save the this tab.

To add devices to a subfolder

1. Select the device from the **All Connections** or any available Tree View.
2. Drag and drop the device status indicator to the desired subfolder. The **Add to Custom Folder?** dialog box displays.

Operating Tip — *You can re-organize devices in a subfolder using the drag and drop method.*

3. Re-name the device, if desired, by entering a new name in the **Name Prefix** field. Note that the new name only applies to the device in the Custom Folder view.
4. Click **OK**.

To re-name a subfolder

1. Right-click the subfolder icon.
2. Select **Rename** to display the **Rename** dialog box.
3. Enter the new name in the **Name:** field.
4. Click **OK**.

To save an Advanced Tree View tab

- On the Custom Folders toolbar, select . If you do not see this button, click first to display a list of available functions.

To clear an Advanced Tree View tab

- On the Custom Folder toolbar, select . If you do not see this button, click first to display a list of available functions.

To open or close an Advanced Tree View tab

- To open a tab, select **Views** > **Advanced Tree View**.
- To close a tab, right-click the **Custom Folders** tab, then select **Close**.

The Device Editor Area

This section briefly summarizes the Device Editor area. For details on using Device Editor tabs in DashBoard, refer to the chapter "**Configuring Devices**" on page 6-1.

Note — *Some devices may not have Device Editors as presented here. Refer to the manual that came with your device for specific details on managing your device using DashBoard.*

Overview

The **Device Editor** area displays tabs for devices selected from the tree views. Each device is represented as a tab in the Device Editor area from which you can access the available parameters and menus for that device.You can organize the arrangement of tabs in the Device Editor by dragging and dropping the tabs.

Figure 4.4 provides an example of a Device Editor tab for an openGear card. In this example, the status indicator, the name of the openGear frame, the slot number that the device is installed in, and the device type are displayed on the top left corner, status information in the bottom left corner, and the available parameters used to control the device in the right-side of the tab. The information and parameters displayed in a Device Editor tab depends on your device and may not reflect what is shown in **Figure 4.4** and described below.

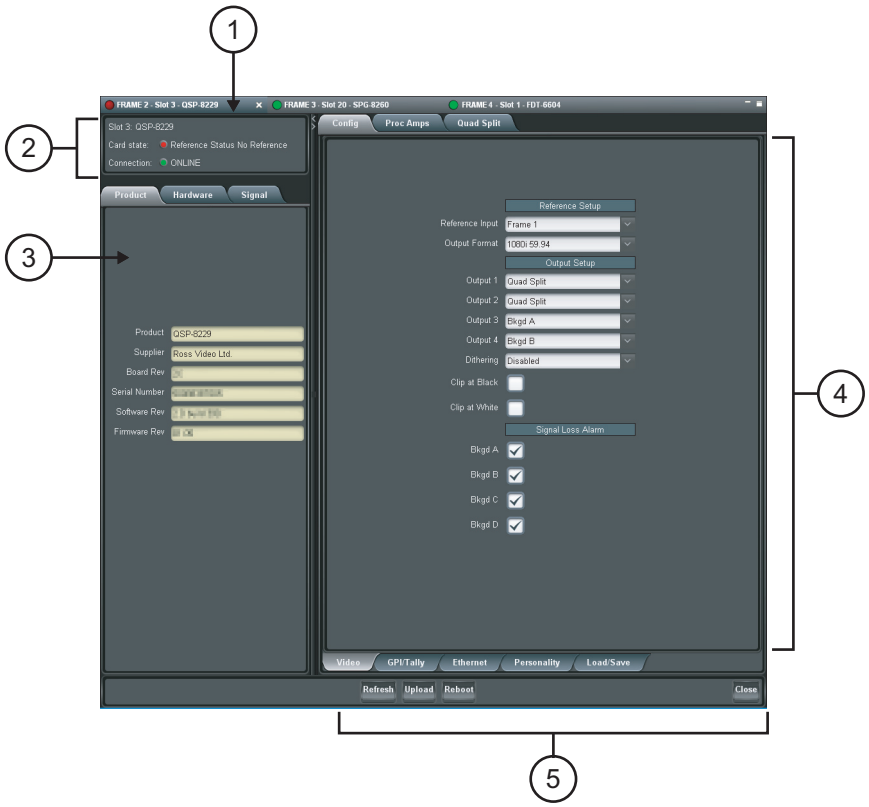


Figure 4.4 *Device Tab in Device Editor Area — Example of an openGear Card*

1. Device Tab Title

This area displays information to help identify the device such as its status, and the product name. If the device is an openGear card, this tab also displays the openGear frame and the slot that the card is installed in. This information is reported automatically by the device.

2. **Status Overview**

   Your device may include an area that reports the operating status and communication activity.

3. **Read-Only Information**

   Your device may include an area that displays read-only information such as the status parameters as reported by the device. The parameters and options in this area are dependant on the device selected, but can include the product details such as software versions, hardware information, and signal status. In **Figure 4.4**, the tabs are named **Product**, **Hardware**, and **Signal**, and display as read-only fields.

4. **Settings and Parameters Area**

   The contents of this area are dependant on the device selected but can include source selection, video format and timing settings, alarm reporting options, and audio parameters. All changes to openGear card parameters are immediate. Refer to your device manual for details.

5. **Button Area**

   The following buttons may be available:

   - **Refresh** — Use this button to request the latest information from the device.
   - **Upload** — Use this button to upload new software to the device.
   - **Reboot** — Use this button to instruct the device to reboot.
   - **Close** — Use this button to close the current Device Editor tab.

Using the Device Editor Feature

This section briefly summaries how to use some of the Device Editor features.

To display a Device Editor tab

Display a Device Editor tab using one of the following methods:

- Double-click a device in a **Tree View**.
- Right-click the device in a **Tree View** and select **Open**.
- Drag and drop the device from the Tree View to the Device Editor area.

To refresh the parameters of a device

- Click **Refresh** on the **Device Editor** tab.

To maximize or minimize a Device Editor tab

1. Right-click the applicable **Device Editor** tab.
2. Select **Maximize** or **Minimize** from the menu.

To organize the Device Editor tabs

Organize tabs using one of the following methods:

- Dock or undock the **Advanced Tree View** and **Layout List** from the DashBoard window by dragging it outside the DashBoard window.
- Drag and drop the Device Editor tabs to organize a layout as required. For information on saving and recalling layouts, refer to the section "**Using Layouts**" on page 4-15.

To close a Device Editor tab

1. Right-click the **Device** tab you wish to close.
2. Select one of the following options:
   - **Close** — Closes the selected Device Editor tab.
   - **Close Others** — Closes all other Device Editor tabs in the group but the highlighted tab.
   - **Close All** — Closes all Device Editor tabs in that Tab Group.

Using Layouts

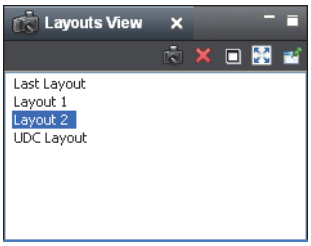
This section summarizes the Layout feature of the DashBoard client interface. Information on creating, saving, and managing layouts in the Device Editor is also included.

Overview

Layouts are used to save window configurations in your DashBoard interface. For example, you can save a layout which shows a certain set of devices open in the **Device Editor** area, two Custom Folder tabs, each with a specific size and location on the screen. You can also determine how these **Device** tabs are displayed (tabbed, tiled, or in groups), and whether any Custom Folder tabs are included.

When a layout is saved, it captures details such as how each component of DashBoard is displayed, including the state of any Device Editor tabs, the current tab selection, divider positions between tabs, and scroll position in Device Editor tabs.

Each layout also saves the DashBoard window state, size, and position. Note that the size and position of any undocked tabs are also saved. When restoring layouts from the Layout List, you can toggle whether to use the stored layout, or the current layout, of the open window with the three right-hand buttons on the toolbar.



Layouts View Tab

The following buttons are available in the toolbar of the Layout List, from left to right:

- **Save Layout** — Use this button to open the Save Current Layout dialog box.
- **Delete the Selected Layout** — Use this button to delete the currently selected layout in the Layout List.
- **Maintain Window State** — Click this button to keep the DashBoard window at its current state when restoring a layout (maximized or sized). Click the button again to turn off this feature.
- **Maintain Window Size** — Click this button to keep the DashBoard window at its current size when restoring a layout (if not maximized). Click the button again to turn off this feature.
- **Maintain Window Position** — Click this button to keep the DashBoard window at its position on the desktop when restoring a layout. Click the button again to turn off this feature.

Managing Your Layouts

Once your DashBoard window and **Device** tabs are organized the way you wish, you can save this configuration as a new Layout.

To display a Layouts View tab

Display a Layouts View tab using one of the following methods:

- Select **Layouts** > **Show Layouts View**.
- Select **Views** > **Show Layouts**.

To organize the tabs

1. Click the tab you wish to move.
2. Drag and drop the tab to the new location within the DashBoard window.

To re-position a tab in DashBoard

1. Click the tab you wish to move.
2. Position a tab using one of the following methods:
   - Drag and drop the tab to the new location within the DashBoard window.
   - Undock the tab from the DashBoard window by dragging it outside the DashBoard window.

To save the current layout

1. Click in **Layouts View** tab to display the **Save Current Layout** dialog box.
2. Enter a name for the new layout in the provided text field.
3. Click **OK**.

To recall a layout

Recall a layout using one of the following methods:

- Select **Layouts** from the main DashBoard toolbar. Select a layout from the provided list.
- From the **Layouts View** tab, double-click the name of the layout. DashBoard restores the tab selection, divider position, and scroll position of any Device Editor tabs that were opened when the layout was last saved.

To rename a layout

1. Right-click the layout in the **Layouts View** tab.
2. Select **Rename** to open the **Rename Layout** dialog box.
3. Enter a new name for the layout in the provided text field.
4. Click **OK**. The new name for the layout displays in the **Layouts View** tab.

To delete a layout

1. From the **Layouts View** tab, select the layout you wish to delete.
2. Click to display the **Confirm Layout Delete** dialog box.
3. Click **OK**. The layout is deleted from the **Layout List**.

Keyboard Shortcuts

The Keyboard Shortcuts feature provides the ability to define a library of commands than can be executed through a series of keystrokes in the DashBoard client, openGear Connect compatible products, and other DashBoard product plug-ins. The DashBoard client comes with a standard library, but additional commands may be available depending on the plugs-ins you have installed.

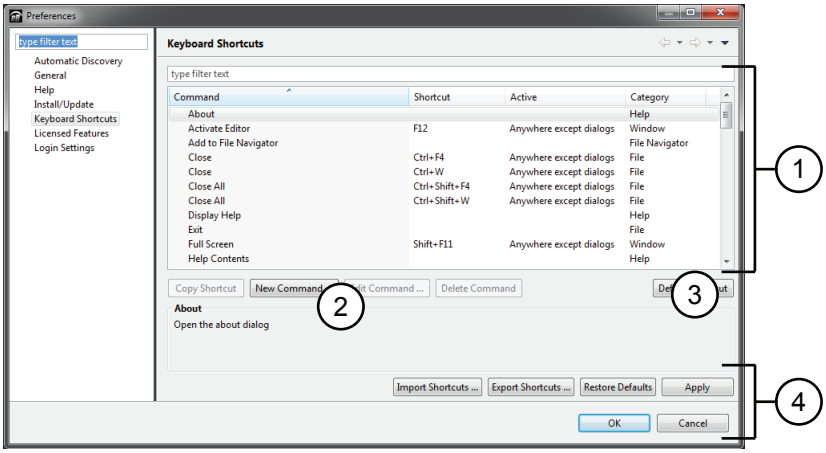
This section provides a brief overview of how to manage your library in the DashBoard client. For information on commands available for your specific openGear Connect compatible product, refer to its user documentation.

The following terms are used throughout this section:

- **Keystroke** — A combination of simultaneous button presses on your keyboard. References to keystrokes state the button on your keyboard to press, followed by the "+" symbol, followed by the next button to press. There are single key strokes (e.g. **P**), and keystroke combinations (e.g. **P** + **1**). Buttons such as **Shift**, **Ctrl**, and **Alt** are modifier keys and therefore are not considered as button presses.
- **Command** — An action that is executed whenever the keystroke is performed as defined in the **Keyboard Shortcuts** dialog box.
- **Library** — A collection of commands currently available in your DashBoard client. You can save your library as an *.xml file on your computer and then import this file to other computers running compatible DashBoard clients.

Overview

From the **Keyboard Shortcuts** dialog box in the DashBoard client, you can change the keystrokes used to trigger commands, delete commands, manage your library, and reset your library to the factory default values.



KeyBoard Shortcuts Dialog Box

1. Commands Set Area

This area displays a list of the commands currently enabled in the library for your DashBoard client. The commands are listed in a spreadsheet format with the following columns (left to right):

- **Command** — Displays the name of the command.
- **Shortcut** — Displays the keystrokes for the command.
- **Active** — Defines when the command is executed. There are three standard options but additional options may be available depending on the plug-ins in the DashBoard client.
- **Category** — Specifies the application element that the command affects.

2. **Command Management Area**

   The following buttons are available in this area:

   - **Copy Shortcut** — Creates another instance of the selected command, however the Shortcut (keystrokes) and Active values are not copied.
   - **New Command** — Enables you to add a command that is not currently listed in the Commands Set area.
   - **Edit Command** — Enables you to change elements of the selected command such as the required keystroke(s), and when to execute the command.
   - **Delete Command** — Removes the command from the Commands Set area.

3. **Default Shortcut Button**

   Resets only the selected command to its default values.

4. **Library Management Area**

   The following buttons are available in this area:

   - **Import Shortcuts** — Imports a library to your DashBoard client.
   - **Export Shortcuts** — Saves your current library to an *.xml file on your computer.
   - **Restore Defaults** — Applies the factory default values to all the commands in your current library.
   - **Apply** — Applies your changes made in the Keyboard Shortcuts dialog box. If this button is disabled (grayed out), a conflict is occurring. Refer to the section "**Resolving Conflicts**" on page 4-19 for details.
   - **OK** — Applies any changes made to your Keyboard Shortcuts library and exits the Preferences dialog box. If this button is disabled (grayed out), more than one command uses the same keystrokes. Refer to the section "**Resolving Conflicts**" on page 4-19 for details.
   - **Cancel** — Exits the dialog box without applying any changes.

Managing the Keyboard Shortcuts

This section briefly outlines how to perform such tasks as launching the Keyboard Shortcuts dialog box, editing commands, and updating the library.

To navigate to the Keyboard Shortcuts dialog box

1. Select **Window** > **Preferences** to display the **Preferences** dialog box.
2. Click **Keyboard Shortcuts** to display the **Keyboard Shortcuts** dialog box.

To copy a command

1. Select the command from the list in the **Commands Set** area.
2. Click **Copy Shortcut**. The new command is now listed in the Commands Set area.
3. Edit the command as outlined in the section "**To edit a command**" on page 4-19.

To edit keystrokes for a command

1. Select the command from the list in the **Commands Set** area.
2. Click the appropriate cell in the **Shortcut** column.
3. Type the keystrokes you wish to assign to the command. For example, you could press **D** then press **H** for the Display Help command. The new keystrokes now display in the

cell. In the example given, the cell would now display “D, H”. If you press and hold the **Ctrl** button and then press **D**, the new keystrokes would display as “Ctrl+D”.

To add a new command

1. Click **New Command** to display the **Command Configuration** dialog box.
   - The Command Selection dialog box displays a list of available commands. This list is dependent on the plug-ins you have installed in the DashBoard client.
2. Select a command from the list.
3. In the **Shortcut** field, type the keystrokes you wish to assign to the command.
4. From the **Active** drop-down menu, specify when to execute the command.
5. Click **Next** and follow the on-screen instructions.
6. Click **Finish** to apply your changes, add the new command to the list in the **Commands Set** area, and return to the **Keyboard Shortcuts** dialog box.
7. Click **OK** to apply your changes and exit the dialog box, or click **Apply** to update the library without exiting the dialog box.

To edit a command

1. Select the command from the list in the **Commands Set** area.
2. To edit the keystrokes for the command:
   - Click the appropriate cell in the **Shortcut** column.
   - Type the keystrokes you wish to assign to the command.
3. To specify when to execute the command:
   - Click the appropriate cell in the **Active** column.
   - Select an option from the drop-down menu. The following options come standard:
     - **Anywhere** — Executes the command whenever the DashBoard client is running and active or when a dialog box is active.
     - **Anywhere except dialogs** — Executes the command only when the DashBoard client is active but not when a dialog box is active.
     - **Only in dialogs** — Executes the command only when a dialog box is open and active.
4. Click **OK** to apply your changes and exit the dialog box, or click **Apply** to update the library without exiting the dialog box.

Resolving Conflicts

A conflict occurs when the same keystroke(s) are assigned to one or more commands. The DashBoard client detects when there are conflicts and flags them in the Commands Set area by displaying a red icon next to the affected command names and setting each name in red. The **Apply** and **OK** buttons are disabled until the conflict is resolved, and a message is displayed near the top of the dialog box. Refer to step 2. in the section “**To edit a command**” on page 4-19 for details on updating the keystrokes for a command.

Keep the following mind:

- You may elect to keep two or more conflicts active. However, if such commands are triggered, the DashBoard client will prompt you to confirm which command to execute.

- When importing a library, conflicts are also flagged, enabling you to select which command to implement before the library is imported.

Importing and Exporting Libraries

You can save your library to an *.xml file on your computer and then import that library to another DashBoard client. Note that when importing a library from one DashBoard client to another, ensure that the second client is compatible with the first in terms of DashBoard client software version (DashBoard version 5.1.0 or higher) and installed plug-ins.

To save your library to a file

1. Click **Export Shortcuts** to display the **Export Shortcuts** dialog box. Exporting a library also includes any user-defined commands.
2. Follow the on-screen instructions to save the file to your computer.

To import a library to your DashBoard client

1. Click **Import Shortcuts** to display the **Import Shortcuts** dialog box.
   - The Import Shortcuts dialog box displays the commands currently used in your DashBoard client (Old Shortcut column) and a preview of the commands that will be in your library after the import (New Shortcut column).
   - You can select whether to view only those commands with assigned keystrokes by selecting the **Hide commands with no shortcuts** check box.
   - Importing a library merges commands, including any user defined commands, with the current library.
2. From the **Select shortcuts source:** area, specify a library to import using one of the following methods:
   - Use the drop-down menu to select a file provided by the plugs-ins you have installed.
   - Click to display the **Import shortcuts from file** dialog box and navigate to the file on your computer. Follow the on-screen instructions and click **Open** to return to the **Import Shortcuts** dialog box.
3. Click **OK** to import the library and return to the **Keyboard Shortcuts** dialog box.

Resetting to Default Values

You can choose to reset a single command or your entire library to the factory default values. Note that resetting the library also deletes any commands that do not come standard with the DashBoard client or your openGear Connect compatible product. For example, any commands that are copies will be deleted, and any standard commands you edited will be reset.

To reset a single command

1. Select the command from the list in the **Commands Set** area.
2. Click **Default Shortcut**.

To reset the library

1. Click **Restore Defaults**.
2. Follow the on-screen instructions.

Using DashBoard Help

The DashBoard Help system is accessed by selecting **Help** > **Help Contents** from the main toolbar of DashBoard. The DashBoard Help displays, by default, the **Contents** pane and **Search** box in the toolbar.

The following Help Systems are currently available in DashBoard:

- **DashBoard Help** — This is the main Help system for the DashBoard Control System that is available by choosing **Help** > **Help Contents** from the main toolbar. DashBoard Help provides information on the various features and options available in DashBoard. Context-sensitive Help is also available by selecting an interface item, such as the Basic Tree View tab, and clicking **F1** (when running Microsoft® Windows®).
- **openGear Help** — This feature provides information on individual openGear devices, such as frames and cards. You can access the openGear Help for your device by selecting the device in the Tree Views and clicking **F1** (when running Microsoft® Windows®) or by choosing **openGear** from the Help dialog box. An option is provided for importing new help files for openGear devices.
- **URM Help** — This feature provides information on the DashBoard User Rights and Management option.

This section briefly summarizes how to configure the DashBoard Help display options and import new help files.

Configuring the DashBoard Help Display Options

This section summarizes how to configure the DashBoard Help display features:

- **Open Window Context Help** — This is the context-sensitive help that is displayed when you click **F1** (when using Microsoft® Windows®) in the main DashBoard window.
- **Dialog Context Help** — This is the context-sensitive help in a dialog box.

Use the following procedure to configure the Help display options for DashBoard:

1. Select **Window** > **Preferences** to display the **Preferences** dialog box.
2. Select **Help** to display the **Help** dialog box.
3. Specify the browser used to display the DashBoard Help search results by selecting one of the following options from the **Open help search** menu.
   - **In the dynamic help view** — Select this option to display the DashBoard Help search results in a new pane of the DashBoard interface. This is the default setting.
   - **In a browser** — Select this option to display the DashBoard Help search results in your default web browser.
4. Specify how to display help documents, such as user manuals in *.pdf format, by selecting one of the following options from the **Open help view documents** menu.
   - **In place** — The help document is displayed in the same tab as the link to the document. This is the default setting.
   - **In the editor area** — The help document is displayed in a new tab in DashBoard.
   - **In a browser** — The help document is displayed in your default web browser.
5. Specify how to display the DashBoard Help contents by selecting one of the following options from the **Open help contents** menu.
   - **In the help browser** — The DashBoard Help content is displayed in a new pane of the DashBoard interface. This is the default setting.

- **In an external browser** — The DashBoard Help content is displayed in your default web browser.

6. Specify how the openGear Help is displayed by selecting one of the following options from the **Open window context help** menu:
   - **In the dynamic help view** — The selected Dialog Context Help is displayed in a new pane of the DashBoard interface. This is the default setting.
   - **In an infopop** — The Help content is displayed as a persistent popup message.
7. Specify how to display the openGear Help by selecting one of the following options from the **Open dialog context help** menu.
   - **In a dialog tray** — The DashBoard Help content is displayed in a new pane of the DashBoard interface. This is the default setting.
   - **In an infopop** — The Help content is displayed as a persistent popup message.
8. Click **Apply** to save your changes. You can also click **Restore Defaults** to disregard any changes you have made.

Importing openGear Help

DashBoard allows you to download and install additional help files provided by your openGear manufacturer, enabling you to display the most recent help files for your device. There are two methods for importing openGear Help:

- **Importing openGear Help Files** — This method enables you to import a file or directory from a location on your network to your DashBoard workstation. Use this method if you are running Apple® Mac® OS® or Linux® Fedora®.
- **Installing a Ross Video openGear Help Pack** — This method installs an additional DashBoard Help feature that provides a library of Ross Video openGear user manuals. If you are running Microsoft® Windows®, use the procedure provided in the section "**Installing DashBoard Add-on Programs**" on page 2-5. Otherwise, use the procedure for importing openGear Help Files.

Note — *The **Include help content from a remote info-center** option is not implemented.*

Importing openGear Help Files

This section briefly summarizes how to import openGear Help Files into DashBoard. If your openGear manufacturer has provided a Help Pack Add-on program and your computer is running Microsoft® Windows®, use the procedure "**Installing DashBoard Add-on Programs**" on page 2-5.

Use the following procedure to import openGear Help Files:

1. Contact your openGear manufacturer to determine if additional help files are available for your device(s).
2. From the main toolbar, select **File > New** > **Other...** The **Select Equipment or Service Type to Add** dialog box opens.
3. Expand the openGear node.
4. Select **Import openGear Help Files** from the list.
5. Click **Next >**. The **Import openGear Help File(s)** dialog box opens.

6. From the **Add Help From** list, select the type of file to import:
    - **File** — Select this option if the help file is a PDF, or is in a zip file. Proceed to step 7.
    - **Directory** — Select this option if the help file has been extracted to a directory. Proceed to step 7.
    - **Download** — Select this option if the help file is to be downloaded from the manufacturer website. Proceed to step 8.
7. If you selected **File** or **Directory**:
    - Click **Browse...** in the **Selected Help** area.
    - Navigate to the file you wish to import.
    - Click **Open** to return to the **Import openGear Help File(s)** dialog box. Note that the file location is now displayed in the **Selected Help** field.
    - Click **Finish** to import the file into DashBoard.
8. If you selected **Download**:
    - Enter the URL of the help file in the **Selected Help** field.
    - Click **Finish** to import the file into DashBoard.

To view your new help file, choose **Help** > **Help Contents** from the main toolbar and select the file from the **openGear** node.

Preferences

This section briefly outlines additional options available in the **Preferences** menu in DashBoard.

Secure Storage

Ross Video recommends that the **Secure Storage** feature be configured only by system administrators, or as directed by Ross Technical Support when troubleshooting.

Web Browser

The **Web Browser** feature enables you to add, remove, or edit installed web browser applications for your computer running DashBoard. Ross Video recommends leaving the options for this feature at the default states (where the **Use internal Web browser** is selected and the **External Web Browser** is set to the default web browser application for your computer).

Note — *The **Web Browser** feature is not yet implemented.*

DataSafe™

In This Chapter

This chapter provides instructions for configuring and using the DataSafe™ feature in DashBoard. Refer to the ***MFC-8300 Series User Manual*** for details on setting up your MFC-8300 series Network Controller Card.

The following topics are discussed:

- DataSafe Overview
- DataSafe Basics

DataSafe Overview

DataSafe enables you to save openGear card parameters to a file, and later restore those parameters to one or more cards of the same type. Multiple configuration sets can be stored if required. This gives you the flexibility of configuring a large number of cards identically from a single stored configuration. This feature is enabled or disabled on a slot-by-slot basis and currently defaults to OFF.

This feature is available for frames using the MFC-8310-N and MFC-8320-N series cards only. Refer to your openGear card manual for more information on using DataSafe with your card.

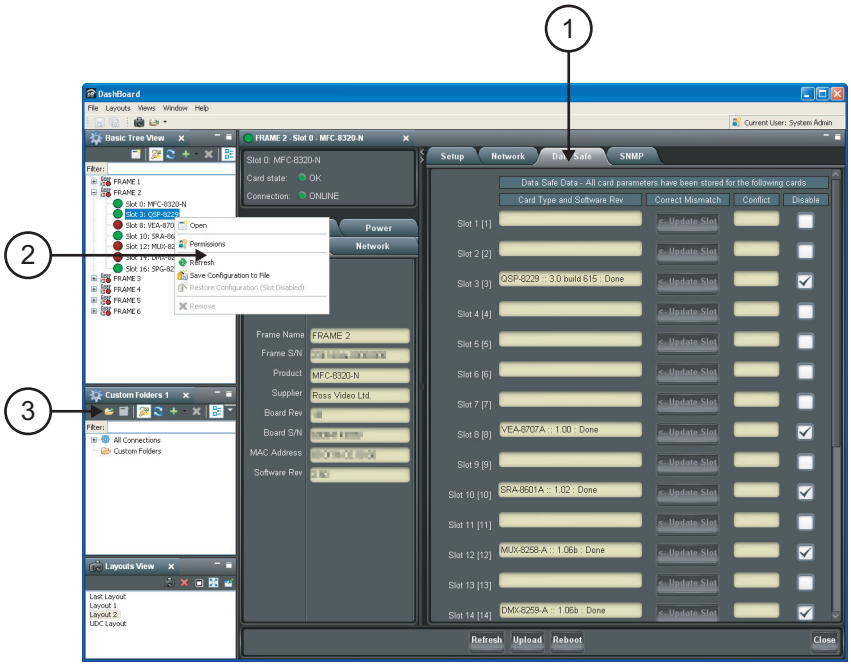


***Figure 5.1** DataSafe Tab Overview*

1. DataSafe Tab

The **DataSafe** tab is available in the **Device Editor** of a MFC-8310-N series or MFC-8320-N series Network Controller Card. The tab lists the cards installed in the frame in slot ascending order. The following items are displayed in the tab:

- **Slot Name** — The slot name is set in the **Card Slots Names** field of the **Setup** tab. The physical slot that the card is installed in is indicated by the number in brackets after the Slot Name. For more information on re-naming slots, refer to the section "**Re-naming an openGear Slot in the Tree View**" on page 6-2.
- **Card Type and Software Rev** fields — This area indicates the card installed in the slot and the software version. The information is displayed in the form of **xxxx :: #### :: y** where **xxxx** represents the card type, #### represents the software revision, and **y** represents the card status. If the field is blank, there is no saved data for this slot. For example, in Slot 3 of **Figure 5.1**, the QSP-8229 is running with software version 3.0 build 615 while Slot 2 does not have a card installed (therefore the field is blank).
- **Correct Mismatch** fields — This area includes the **Update Slot** button. Clicking this button automatically updates the slot with the new card information indicated in the **Conflict** field.
- **Conflict** fields — This field is blank if the card currently in the slot has the same card type and software version as the saved DataSafe data. When the software version or the card type do not match the saved data for the slot, the **Conflict** field for that slot is populated with the new information, alerting the user that a new configuration is

available for that slot. The information is displayed in the form of **xxxx :: #### :: y** where **xxxx** represents the card type, **####** represents the software revision, and **y** represents the card status. If the field is blank, there is no saved data for this slot.

- **Disable** check box — This option disables the **DataSafe** feature for that slot.
- **Force** button — If any slots have a software version mismatch, the **Force** button allows the user to load the current DataSafe data to the cards and overwrites the frame-stored data with the card's current settings. This button is enabled only if a software version incompatibility exists. For more information on forcing DashBoard to update cards with software incompatibilities, refer to the section "**Forcing DataSafe Updates**" on page 5-7.
- **Mask Warning** check box — The MFC-8300 series Network Controller card displays a warning in the **Data Safe State** field of the **Hardware** tab if any of the card slots have an error. For example, if a card is installed that does not match the last saved data for that slot. If the check box is selected, no warnings are displayed in DashBoard. The default setting is to display warnings and errors.

2. Save/Restore Device Parameters in the Basic Tree View

The following DataSafe options may be available when you right-click a device in the Tree View:

- **Open** — Selecting this option enables you to display a Device Editor tab for the selected device.
- **Save Configuration to File** — Selecting this option displays the **Export Slot to file** dialog from which you can save a DataSafe file for the specific card on your DashBoard host machine. For more information on saving DataSafe files, refer to the section "**Saving a DataSafe File**" on page 5-4.
- **Restore Configuration** — Selecting this option displays the **Restore Configuration Wizard** from which you can restore from a DataSafe file for the specific card(s) on your DashBoard host machine. For more information on recalling configurations from a file, refer to the section "**Restoring Configurations to Devices**" on page 5-4.

3. Save/Restore Configurations for Devices in the Advanced Tree View

With the Advanced Tree View feature, the following options are available in the Custom Folder toolbar:

- **Save Configuration to File** — Selecting this option displays the **Export to file** dialog from which you can save the configuration of all the devices in the Custom Folder View to a single DataSafe file.
- **Restore Configuration** — Selecting this option displays the **Configuration Wizard** from which you can recall all configurations for all devices in the Custom Folder View from a ***.tvc** file.

DataSafe Basics

This section provides instructions for saving and recalling DataSafe files. DashBoard saves all card parameter values to the file which is stored locally on the DashBoard client host machine.

Note — *Some openGear cards have card-edge jumper settings that disable remote control. Ensure that your card is configured to enable control from DashBoard before saving and recalling DataSafe files.*

Saving a DataSafe File

DashBoard enables you to save card parameters to a unique DataSafe file which you can name and store on your computer. If you are using the **Advanced Tree View**, an option also exists that enables you to save the configuration of all devices in the specified custom folder. Both methods are described in this section.

Saving a DataSafe File for a Specific Device

This section outlines how to save a DataSafe file containing all of the data of a specific card including the card parameters and settings, frame name, slot name and number, card type, and software revision. This option is always available regardless of which MFC-8300 series Network Controller card is used and which software options have been purchased.

Use the following procedure to save a DataSafe file for a specific device:

1. From the **Tree View**, right-click the card you wish to save the configuration for.
2. Select to display the **Export to file** dialog box.
3. Navigate to the location you wish to save the file to.
4. Enter a filename in the **File name:** field.
5. Ensure the **Save as type:** field is set to **openGear Device File** (***.ogd**).
6. Click **Save**.

Saving a DataSafe File for a Group of Devices

This section outlines how to save the configuration of devices in the Custom Folder View to a single DataSafe file. This file is in the format ***.tvc** (Tree View Configuration) and is stored on the DashBoard host machine.

Use the following procedure to save a DataSafe file for a group of devices:

1. From the **Advanced Tree View**, select the Custom Folder to save the configuration for.
2. Select to display the **Export to file** dialog box.
3. Navigate to the location you wish to save the file to.
4. Enter a filename in the **File name:** field.
5. Ensure the **Save as type:** field is set to **Tree View Configuration** (***.tvc**).
6. Click **Save**.

Restoring Configurations to Devices

DashBoard can send a DataSafe file to a specific MFC-8300 Network Controller Card and slot for use. Once received, the Network Controller Card updates the card if the installed card matches

the data sent. You can also choose to copy parameters from a card to a single device or group of devices. Both methods are described in this section.

As part of the recall process, DashBoard opens a DataSafe file, examines the card type and software revision, and determines what devices on the network in the current Tree View that match. The user can then select which card(s) to update with the new values.

Note — *You must have an MFC-8310-N series or MFC-8320-N series installed in the frame to recall DataSafe data or files.*

Restoring a DataSafe File

This section outlines how to recall a saved DataSafe file on your DashBoard host machine to a single type of device your network.

Use the following procedure to recall a DataSafe file:

1. From the **Tree View**, right-click the device to update.
2. Select to display the **Restore Configuration Wizard** dialog box.
3. From the **Configuration Source** list, select **Load Parameters from a File**.
4. Click **Next >** to display the **Select Device File** menu.
5. In the **Configuration File** field, enter the DataSafe file to download to your card or click **Browse...** to navigate to the file location on your DashBoard host machine.
   - Ensure that the select file is a valid ***.ogd** file.
   - Information, such as the card type, slot and frame names, is displayed in the **Device Info:** field. An error message will also display in this field if a card type or software version mismatch will occur.
6. Click **Next >** to display the **Select Destination** menu. The **Select Destination** menu provides a list of the compatible cards based on the card selected in step 1.
7. Select the device(s) to recall the file to:
   - From the **Select Destination** list, select the check box(es) for the devices you wish to recall the file to.
   - Verify that the device(s) you wish to recall the file to. The **Error/Warning** fields indicate any errors, such as incompatible software or card type mismatch.
8. Click **Finish**.

Restoring Parameters for a Group of Devices

You can recall all configurations for all devices in the Advanced Tree View from a ***.tvc** file. Card parameters will only load from the DataSafe file if the card type matches and the software versions are compatible.

Use the following procedure to recall parameters for a group of devices in the Advanced Tree View:

1. From the **Advanced Tree View**, select the Custom Folder to recall the configuration file for.
2. Select from the Custom Folders toolbar to display the **Restore Configuration Wizard**.
3. From the **Configuration Source** field, select **Load Parameters from a File** to display the **Select Device File** menu.
4. To enter a filename in the **Configuration File:** field:

- Click **Browse...** to navigate to the file location on your DashBoard host machine.
- Ensure that the select file is a valid ***.tvc** file.
- Information, such as the card type, slot and frame names, is displayed in the **Device Info:** field. An error message will also display in this field if a card type or software version mismatch will occur.

5. Click **Next >** to display the **Select Destination** menu. The **Select Destination** menu provides a list of the compatible cards based on the card selected in step 1.
6. Select the devices to restore as follows:
   - From the **Select Destination** list, select the check box(es) for the devices you wish to recall the file to.
   - The **Error/Warning** fields indicate any errors such as incompatible software or a card type mismatch.
7. Click **Finish**.

Copying Parameters

Use the following procedure to copy parameters from one device to another:

1. From the **Tree View**, right-click the device to update.
2. Select to display the **Restore Configuration Wizard** dialog box.
3. From the **Configuration Source**, select **Copy Parameters from another Card**.
4. Click **Next >** to display the **Select Source Device** menu.
5. From the provided list, select the card whose settings will be copied.
6. Click **Next >** to display the **Select Destination** menu.
7. From the provided list, select the device(s) to copy the parameters to. The **Error/Warning** fields indicate errors such as software or card type mismatch.
8. Click **Finish**.

Notes on Saving and Restoring Parameters

This section provides brief operational notes when saving and restoring parameters:

- The **Restore Configuration Wizard** dialog box includes the **Hide invalid destinations** check box. Selecting this check box hides cards in the **Select Destination** list that are not applicable based on the card type you selected to restore and the software of that card. Only those cards that are the same type and compatible software versions will be listed.
- The **Select Destination** list displays the frame and cards in the same format as seen in the Tree View. For example, if the frame node is expanded in the Tree View, the same node is expanded in the **Select Destination** list.
- You can select all devices in a single frame by selecting the checkbox beside the frame entry in the **Select Destination** list.
- The indicator beside the frame name in the **Select Destination** list indicates that at least one device in that frame is selected. A checkbox beside the frame name indicates that all the devices in that frame are selected.

Forcing DataSafe Updates

If any slots have a software version mismatch, the **Force** button allows the user to have the current DataSafe data loaded to any slots where a software mismatch is occurring. This button and text only displays if a software version mismatch occurs in the DataSafe tab.

Note — *A mismatch is reported in the **Conflict** field of a slot if a new card is installed into that slot is a different card type, or has a software incompatible version, than the current DataSafe file. If this new card remains installed into that slot for more than approximately 24 hours, then the parameters of the new card will automatically be saved as the new DataSafe file.*

The following tasks are performed when the **Force** button is clicked:

- Loads all of the data from the card
- Stores the data as the new DataSafe data
- Clears the information in the **Conflict** field
- Updates the Slot field in the **DataSafe** tab

Configuring Devices

In This Chapter

There are two basic methods to configuring devices: offline and online. An online device is one that is actively communicating with your DashBoard client. You make changes in the Device Editor tab that take affect immediately on that device. An offline device is one whose configuration has been saved to a file for offline configuration. In this case, you use the File Navigator tab to edit a device configuration file that can then be saved on your computer. Changes made to this file do not affect the actual device. This device configuration file can then be applied to other devices of the same type. This chapter provides information on both methods.

The following topics are discussed:

- Configuring Online Devices in DashBoard
- Using the File Navigator
- Upgrading Device Software

Configuring Online Devices in DashBoard

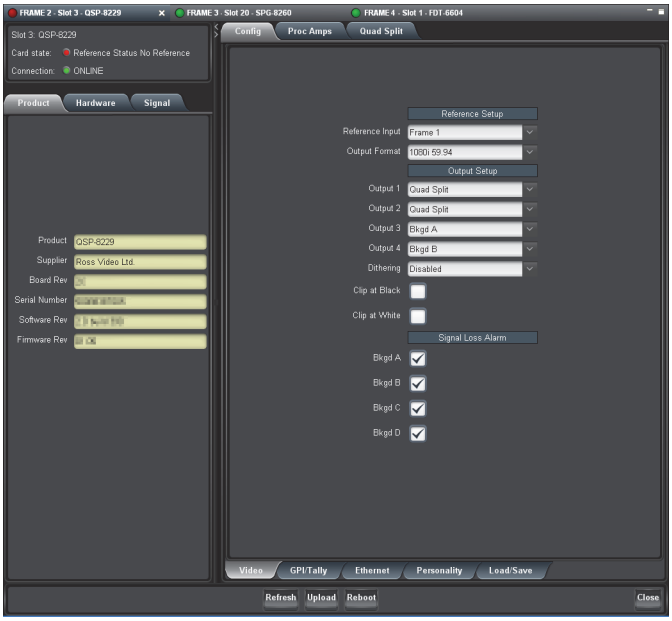
DashBoard enables you to configure devices in real-time. Each device has specific configuration parameters, depending on the device you have selected in the **Tree View**. For example, you may wish to change a specific parameter on a device while it is online in your openGear frame, or re-configure a device, or upload new device software when it becomes available.

Caution — *Using the **Reboot** button takes the device off-air during the reboot cycle.*

Configuring Devices in DashBoard

Use the following procedure to configure and verify device information in DashBoard:

1. From the **Tree View**, double-click a device to display a corresponding **Device Editor** tab. In the following example, the **Device View** displays settings for the QSP-8229 located in Slot 3 of FRAME 2.



Device Tab Example

2. Configure the required parameters using the controls provided in the **Settings Area**, such as those in the **Setup** tab seen in the previous example. Refer to the manual for your device for information on available parameters and menus.

Re-naming an openGear Slot in the Tree View

DashBoard offers two methods to re-name a card slot. Both methods are described in this section.

- **Using the Setup tab of the Network Controller Card** — Use this method to rename the card and have the change effective for the network. The new name displays in all DashBoard Tree Views for all DashBoard workstations connected to that card.
- **Using the Rename option for a Custom Subfolder item** — Use this method to rename the card for your local DashBoard workstation only. Other DashBoard workstations will not display the new name.

Using the Setup tab

Use the following procedure to re-name an openGear card using the **Setup** tab:

1. From the **Tree View**, double-click the MFC-8300 Network Controller Card to display a corresponding **Device Editor** tab.
2. Select the **Setup** tab.
3. In the **Card Slot Names** section of the **Setup** tab, locate the slot you wish to re-name.
4. Enter the new name for the card slot in the text field provided. The new name displays in all instances of the card for all DashBoard workstations.

Using the Rename Option

Use the following procedure to re-name a device using the Rename option:

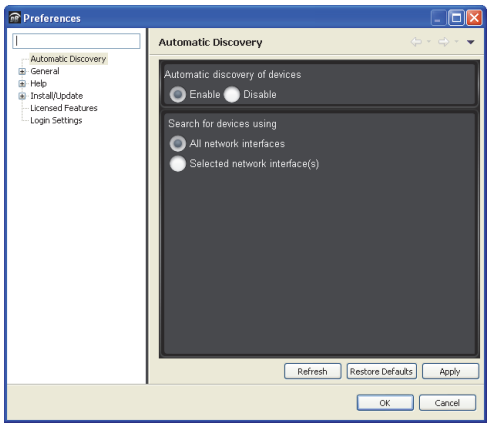
1. From the **Custom Folder** in the **Advanced Tree View**, right-click the device you wish to re-name.
2. Select to display the **Rename** dialog box.
3. Enter the new name for the device in the **Name:** field.
4. Click **OK**. The new name is only displayed on your local DashBoard workstation.

Automatic Discovery

The Automatic Discovery feature is enabled by default, and allows DashBoard to automatically search for new devices. You can specify that DashBoard search all interfaces on the same network, or search only those interfaces you have selected.

To configure the Automatic Discovery feature

1. From the main toolbar, select **Window > Preferences**. The **Preferences** dialog box opens.
2. Select **Automatic Discovery** to display the **Automatic Discovery** dialog box.



Automatic Discovery Dialog Box

3. Select the **Enable** check box in the **Automatic Discovery of devices** section to enable the feature. Deselecting the check box disables the Automatic Discovery feature.
4. Select a **Discovery** mode as follows:

- **All network interfaces** — Select this option to enable DashBoard to find openGear cards only on the local network. DashBoard queries the network every 10 seconds and display new devices in the **Tree View**s. This is the default setting.
- **Selected network interface(s)** — Select this option to enable DashBoard to query the specified network every 10 seconds and display new devices in the **Tree Views**.

5. Click **Apply**.

Troubleshooting

If you are unable to make changes to the parameters of a device, or the **Upload** or **Reboot** buttons are disabled:

- verify that any edit permissions for the device are enabled in the **Device** tab.
- verify any relevant controls on your device hardware are set to enable remote control.

Note — *Not all openGear devices support the edit permissions feature and it is recommended that you refer to the documentation for your device for details. This control typically appears on the **Setup** tab of the **Device View**.*

Removing Devices from the Tree View

If a device is still listed in the **Tree View**, but with a grayed out status indicator, then DashBoard is no longer communicating with the device. You can remove such devices from the **Tree View** using the following procedure.

To remove all offline devices in an openGear frame

1. In the **Tree View**, right-click the device which is offline device.
2. Select **Remove offline devices** to remove the offline device from the **Tree View**.

Operating Tip — *You can also select the device and right-click to remove it from the **Tree View**.*

Using the File Navigator

The **File Navigator** tab in DashBoard enables you to quickly navigate, manage, and update device configuration files. A device configuration file stores the configuration of a specific device. This functions much like the DataSafe feature for openGear cards where you can save the settings of one device to a file and recall that same file to a device of the same model. The File Navigator enables you to edit the settings of a device separate from the actual device, allowing you to store the new configuration as a separate file or update the current one.

Just like the other tree views, the File Navigator tab displays device configuration files in a hierarchy. But the hierarchy is determined by the folder organization on your computer. Note that when you collapse a folder in the File Navigator tab, every device file under the folder is disconnected.

To display a File Navigator tab

1. Select **Views** from the main toolbar.
2. Select **File Navigator** to display a new File Navigator tab in the DashBoard window.

To display your device files in a File Navigator tab

1. Click on the **File Navigator** toolbar to display the **Browse For Folder** dialog box.
2. Navigate to the folder on your computer where your device configuration files are stored.
3. Select **OK** to close the dialog box and update the tree view in the **File Navigator** tab. The selected folder is displayed.

To edit a device file

1. In the tree view of the **File Navigator** tab, expand the node of the folder to view a list of available device configuration files. You can also search the file hierarchy by entering text in the **Filter** field.
2. Double-click the file you wish to edit to establish a connection to it. The icon will no longer be grayed-out.
3. Display a Device Editor tab in the DashBoard window.
4. Configure the device parameters as required. An asterisk (*) displays on the File Navigator tab and on the applicable Device Editor tab whenever there are unsaved changes in a device configuration file. The file that has unsaved changes is also set in blue in the **File Navigator** tab.
5. Save your changes using one of the options in the **File** menu. You can also use the provided buttons on the DashBoard main toolbar.

To remove a device file from the File Navigator tab

1. In the tree view of the **File Navigator** tab, select the file you wish to remove. Note that this does not delete the file from your computer.
2. Click on the **File Navigator** toolbar.
3. Click **OK**.

To refresh a directory

1. Right-click the folder in the tree view of the **File Navigator** tab.
2. Click **Reload**.

Upgrading Device Software

DashBoard enables you to upload software updates to multiple devices available in the **Tree View**. You can select any number of similar devices to upgrade (upload software files to) and monitor the upgrade progress. This section summarizes the upload software process. The process may differ for your specific device. Refer to your device user manual for information on upgrading the software before proceeding.

Upgrading Device Software

Use the following procedure to upload software to a device:

1. Contact your Ross Technical Support representative for the latest software version for your device.
2. Display the **Device** tab of the device you wish to upload software to.
3. In the **Device** tab, click **Upload** to display the **Select File Upload** menu of the **Upload Software Wizard**.
4. Select a file to upload as follows:
   - Click **Browse...** to navigate to the *.bin upload file you wish to upload. DashBoard automatically selects the last directory that you loaded a file from.
   - Select a file to upload.
   - Select **Open** to return to the **Select File Upload** menu.
   - The **Select File Upload** dialog box now displays the path to the selected file, and information on the selected file such as name, type, load size, and creation date. A warning is displayed in the **Warnings** field when software conflicts occur, such as the selected file will downgrade the selected device.
5. Click **Next >** to display the **Select Destination** menu.
6. Select the device(s) you wish to upload the selected software file to as follows:
   - Note that only the device you selected in is selected.
   - If you wish to include other devices, select the desired devices from the **Select** drop-down list using one of the following options:
     - › **Select All** — This option selects all the similar devices. The selected software file will be uploaded to all devices on the network.
     - › **Select Without Warnings** — This option selects only those devices that do not include a conflict with the selected software file.
     - › **Select Without Warnings (include downgrades)** — This option uploads the software to similar devices that do not have any conflicts, but will include those devices that will be downgraded if the selected software file is uploaded to them.
     - › **Select None** — This option clears all the check boxes in the **Device** field.
     - › Click **Select**.
   - The **Device** field, located below the **Select** drop-down list, displays information such as the device name and slot information, frame it is installed in, the current software version, and any applicable error messages are displayed.
   - You can also select the devices to upgrade by selecting or clearing the corresponding check boxes in the **Device** field.
   - If the **Hide invalid destinations** check box is selected, the menu only displays similar devices for the selected software file. For example, if you are attempting to

upload a software file for a UDC-8625, only UDC-8625 cards will be displayed. If the check box is cleared, all devices currently installed on the network are displayed but are grayed out.

7. Click **Finish**. The **Uploading to Selected Devices** menu displays and the upload process begins. A progress bar displays in the **Uploading to Selected Devices** menu for each device you selected in step 6.

Important — *Clicking during an upload can leave the device in an invalid state.*

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8. Monitor the upgrade process bar(s) displayed in the **Uploading to Selected Devices** menu while the software is upgraded to your device. You can also display the **Uploading to Selected Devices** menus as a new tab in DashBoard, allowing you to work in other DashBoard areas during the upload, by selecting the **Run in Background**.
9. When the upload is complete, click **OK** to close the **Uploading to Selected Devices** menu.

Troubleshooting the Software Upload Process

Use the following information if the software upload process has failed:

- If the "**Selected file does not exist**" or "**Selected file is not a valid upload file**" error conditions are displayed in the **Upload Failed** dialog box, select **OK** from the dialog box and re-start the upload process and select the correct file.
- If a "**No response from device**" condition is encountered, the upload failed while in progress due to loss of power or communications. Verify that the device is powered on and that you have communication to the openGear frame. You must then restart the upload process.

Notes:

Contact Us

Contact our friendly and professional support representatives for the following:

- Name and address of your local dealer
- Product information and pricing
- Technical support
- Upcoming trade show information

Technical Support	Telephone:	+1 613 • 652 • 4886
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